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ABSTRACT

Designed for use as a supplemental or primary teaching aid in a postsecondary office occupations class, this module on indexing personal, business, and other names consists of an instructor's guide and a student activity packet. The instructor's guide provides general instructions for using a slide/tape presentation by an individual or in a group setting. It also provides specific instructions that include an introduction to the presentation, time and facilities, suggested class discussion, suggested student activities, suggested evaluation criteria, answer keys to the student activities, the script (description of each slide and its narration), and a list of references. The student activity packet consists of a section on information the student must know in order to complete the activities (purpose, materials, directions), a student checklist to be used during the viewing of the slide/tape presentation for note taking, and seven activity sheets to be completed in order to master the competencies on which the module is based. (YLB)

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ED230794

# OFFICE OCCUPATIONS

# ALPHABETICAL INDEXING FOR NAMES OF INDIVIDUALS AND BUSINESSES

AUDIOVISUAL PACKAGE

*Prepared by Dr. James J. Zukowski*

## INSTRUCTOR'S GUIDE
## STUDENT ACTIVITY PACKET

CE036288

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# ALPHABETICAL INDEXING FOR NAMES OF INDIVIDUALS AND BUSINESSES

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# INTRODUCTION

This module, made up of a slide/tape presentation and accompanying printed materials, was developed as a result of a proposal funded by the Texas Education Agency to the Occupational Curriculum Laboratory at East Texas State University. Based on the results of a needs assessment of selected postsecondary office occupations instructors from across the state of Texas, this and several other modules were developed to provide instructional materials in competency areas that require formal classroom training. Selected postsecondary office occupations instructors assisted in the development, field review, and evaluation of the final product.

Included in each slide/tape package are a set of full-color slides, a script, a cassette tape, an instructor's guide, and a student activity packet. Each package includes an instructor's guide with general instructions for use by an individual or in a group setting, the slide/tape presentation, and specific instructions on how to use the materials in a particular package. The specific instructions section contains solutions for the activities completed by the students and suggestions for evaluation of the work produced.

The student activity packet consists of a section on information the student must know in order to complete the activities, any necessary resource materials, and the activities to be completed in order to master the competencies on which the module is based.

All of the materials in these modules have been developed with student needs and interests in mind and are designed with the flexibility for use as supplementary or primary teaching aids in many of the office occupations classes. As a result, the students should find the material practical and job-related.

ACKNOWLEDGMENTS

We extend special thanks to the following Dallas County Community College District personnel for their service as Advisory Committee Members and critical evaluators for this project:

Linda Coffey, District Director of Occupational Education

Patsy Blankenship, North Lake College

Sharon Burton, Brookhaven College

Earlyne Purdy, Eastfield College

In addition to these specific individuals, other selected postsecondary business and office occupations instructors in Texas community colleges have also critically reviewed the materials in their draft form and have provided valuable input for assuring that the final product be as realistic and job-oriented as possible.

Appreciation is also given to the following businesses and institutions which allowed our writers and photographers access to their facilities. It is through their cooperation that the slides which accompany these packages show actual office settings:

Brookhaven College

Office Occupations Laboratory

Job Placement Center

East Texas State University

Business Education Department

Xerox Corporation, Dallas

Sun Production Company, Dallas

Pacific Mutual Insurance Company, Dallas

Finally, special appreciation is extended to Joyce Johnson, East Texas State University, and David MacAnally, Paris Junior College, for their input in the initial development of these materials.

# *INSTRUCTOR'S GUIDE*

# ALPHABETICAL INDEXING FOR NAMES OF INDIVIDUALS AND BUSINESSES

## INSTRUCTOR'S GUIDE

## GENERAL INSTRUCTIONS

### Equipment Needed

Before using this presentation, make sure that arrangements have been made to have the following equipment available:

Projector
Projection Screen
Cassette Recorder

Make sure that all equipment is working properly.

### Preparations Before Class

There are some things that you should do before showing the slide/tape presentation.

1. Preview slide/tape presentation and determine how it will be used in your class.
2. Plan short but relevant introductions to tell students what to look for in the slide/tape presentations.
3. Make seating arrangements so that every student can see the screen.
4. Allow enough time to show the presentation in its entirety.
5. If you use handouts, be sure they are distributed <u>after</u> the presentation.

### Procedures for Group Setting

1. Choose a point in the lesson where the slide/tape presentation will have the greatest impact.
2. After showing the slide/tape presentation, ask students to give highlights in their own words.
3. If necessary, show the entire presentation or parts of it a second time to emphasize points important to the successful completion of the lesson.
4. After showing the presentation, make arrangements for students to use it on an <u>individual</u> basis.

Procedures for Individual Setting

1. Make sure space and equipment are available.
2. Check equipment to make sure it is working properly.
3. Demonstrate or have someone demonstrate the procedure for using equipment.
4. Tell students to view the slide/tape presentation or parts of it for reinforcement.
5. Have students view the slide/tape presentation.
6. Ask students to summarize the slide/tape presentation.

Instructions for Using Slides and Cassette Tapes

1. Pick up each slide by the frame, being careful not to touch the film.
2. Use the side of the tape which is compatible with the equipment you are using. One side of the cassette tape contains an audible advance and the other side contains an inaudible advance.
3. Arrange the slides in the slide tray in sequential order to insure that each projection is viewed from left to right.
4. Insert the cassette tape in the recorder/player.
5. Rewind the cassette tape to make sure that it will start at the beginning.
6. Turn on the slide projector. The first slide should be projected on the screen.
7. Start the cassette player.
8. Depress the advance button at the sound of the "beep" if you are using the audible advance.

(NOTE: Review the above procedures with those students who will be using the package individually.)

Student Checksheets

Student checksheets provide a convenient means for students to take notes while viewing the slide/tape presentations. The points identified on the student checksheet are those the student will have to be familiar with in order to complete the activities provided.

## Resource Sheets

Resource sheets provide information essential for reinforcing the competency requirements of the slide/tape presentation.

Students should read the resource sheets as instructed in each student activity packet.

## Activity Sheets

Activity sheets are working papers for students. Students are instructed to use them when completing certain activities.

# ALPHABETICAL INDEXING FOR NAMES OF INDIVIDUALS AND BUSINESSES

INSTRUCTOR'S GUIDE

## SPECIFIC INSTRUCTIONS

### Introduction to Slide/Tape Presentation

Alphabetical Indexing for Names of Individuals and Businesses is an audiovisual aid developed to help students become familiar with procedures involved in filing personal names.

This slide/tape package consists of 71 full-color slides, a cassette tape, an instructor's guide, and a student activity packet that could be used as primary or supplementary instructional tools in office/secretarial procedures, typewriting, and business communications classes.

### Script

A description of each slide and its narration can be found at the end of the Specific Instructions.

### Time and Facilities

One class period of at least 45 minutes in length should be set aside for introduction and presentation of the slide/tape, which can be utilized in any room that can be sufficiently darkened or that has individual carrels equipped with slide carousels and cassette tape recorders. In addition, students should be able to complete the 7 activities in approximately 3-4 hours.

### Suggested Class Discussion (for use in a group setting)

After the presentation has been viewed, rules for alphabetical indexing of personal, business, and "other" names should be reviewed. Alphabetically arranged files should be available so that the student(s) can view the application of the indexing procedures.

At this time a review of items used in the filing process, such as tabs, folder, etc., should be included so that the student(s) can see how the equipment used in filing is put to use. This review is available in another slide/tape presentation entitled Introduction to Filing, or a review may be developed by the teacher.

## Suggested Student Activities

After any classroom or one-to-one discussion has been completed, the seven activities should be made available to the student(s). The activities can be completed individually or may be presented as an entire learning packet. Additional teacher-developed exercises should be made available to any student(s) experiencing difficulty with the alphabetical indexing procedures. Moreover, the student(s) can review the slide/tape presentation to alleviate any specific difficulties.

## Suggested Evaluation Criteria

The following is a checklist that can be used when evaluating the student's successful completion of this packet. This checklist is not intended as a method of grading but merely as a means of determining whether or not the student has mastered the competencies presented in this package.

1. Completion time for activities

   a. Completion time less than suggested time limits _____
   b. Completion time within suggested time limits _____
   c. Completion time exceeded suggested time limits _____

2. Participation in class discussion (based on quality of input)

   a. Excellent (Student took a leadership position.) _____
   b. Good (Student contributed and explained satisfactorily.) _____
   c. Fair (Student contributed, but explanations were less than satisfactory.) _____
   d. Poor (Student contributed little and offered no explanations.) _____
   e. Student did not participate.

3. Student Activities

   a. Student was able to successfully complete the seven activities and correctly index all of the names in each exercise within the specified time period. _____
   b. Student was not able to successfully complete all seven activities and correctly index all of the names in each exercise within the specified time period. _____
   c. Student was not able to successfully complete any of the exercises within an activity in the allotted time period. _____

KEY

Activity 1

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | Beasley | Carol | Ann |
| 2. | Coyne | James | D. |
| 3. | Dexter | Barbara | Jane |
| 4. | Ensley | Thomas | H. |
| 5. | Franks | Linda | Joe |

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | Carlton | Jean | |
| 2. | Corley | James | T. |
| 3. | Fietz | Mark | |
| 4. | Franks | Betty | |
| 5. | Smith | Allen | A. |
| 6. | Smith | Allen | T. |

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | Curry | H. | |
| 2. | Curry | Hazel | |
| 3. | Curry | J. | |
| 4. | Curry | J. | B. |
| 5. | Dabbs | | |
| 6. | Dabbs | L. | |

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | D'Ambrosio | Joseph | |
| 2. | DaPrile | Nicholos | |
| 3. | Deer | John | |
| 4. | DeLuca | Joan | Lynn |
| 5. | MacFarland | Randy | J. |
| 6. | Saint | James | George |

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | Al- | Alawi | Asad |
| 2. | Barry- | Smith | John |
| 3. | Corbie- | Bender | Pat |
| 4. | Kwang- | Shik | Min |
| 5. | Lein- | Schmidt | Charles |

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | Carter | Jan (Governor) | |
| 2. | Cromer | Linda (Mrs.) | |
| 3. | DeLoney | Jason (Father) | |
| 4. | Father | John | |
| 5. | Green | Charles (M.D.) | |
| 6. | Hays | Mary (D.D.S.) | |
| 7. | Queen | Mary | |
| 8. | Sister | Francis | |

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | Curry | H. | |
| 2. | Deer | John | |
| 3. | McFarland | Randy | J. |
| 4. | Stewart | W. | A. (Second) |
| 5. | Stewart | W. | A. (Senior) |

| | 1st unit | 2nd unit | 3rd unit | 4th unit |
|---|---|---|---|---|
| 1. | Abbowich | Al | | |
| 2. | Ball | Carl | | |
| 3. | Grant | C. | B. | Boston |
| 4. | Grant | C. | B. | Chicago |
| 5. | Lovell | Claude | | |

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | Burnett | Carol (Mrs. Joe Hamilton) | |
| 2. | DeWolfe | Jane (Mrs. Amos) | |
| 3. | Little | Alice (Mrs. John) | |
| 4. | Long | Carol (Mrs.) (Mrs. William) | |

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 5. | Moore | Mary | Tyler (Mrs. Grant Tinker) |
| 6. | Potter | Frances (Miss) | |
| 7. | Sanders | Joan (Rev.) | |
| 8. | Smith | Mary (Mrs.) (Mrs. M. W.) | |

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | Holmes | Robert | |
| 2. | Mathis | L. | |
| 3. | Mathis | Larry (Dr.) | |
| 4. | Mayer | Pati (Mrs.) (Mrs. John) | |
| 5. | McBrayer | C. | W. |
| 6. | O'Neal | Bertha (Mrs. Tom) | |
| 7. | Prince | Phillip | |
| 8. | Woodward | Joanne (Mrs. Paul Newman) | |
| 9. | Wright | Carl (D.O.) | |
| 10. | Wright | Karl | |

KEY

Activity 2

Exercise 1

1. Devin/G./Abbe
2. William/J./Zigrang
3. Cleve/R./Graham
4. Charles/N./Clardy
5. Bob/Barker
6. John/C./Rast
7. Allen/Abbey
8. W./J./Zigrang
9. Bob/J./Barker
10. David/M./Clardy
11. Terry/Paul/Rast
12. Christy/Graham

| | 1st unit | 2nd unit | 3rd unit |
|---|---|---|---|
| 1. | Abbe | Devin | G. |
| 2. | Abbey | Allen | |
| 3. | Barker | Bob | |
| 4. | Barker | Bob | J. |
| 5. | Clardy | Charles | N. |
| 6. | Clardy | David | M. |
| 7. | Graham | Christy | |
| 8. | Graham | Cleve | R. |
| 9. | Rast | John | C. |
| 10. | Rast | Terry | Paul |
| 11. | Zigrang | W. | J. |
| 12. | Zigrang | William | J. |

Exercise 2

1. Tom/Fitzgerald
2. Captain John/Wynn
3. Dr. Lorne/T./LaVigne
4. Donna/D./Wynn, CPA
5. Sister/Mary/Francis
6. Tom/A./Quinn-Martin
7. T./L./FitzGibbon
8. G./M./O'Grady
9. Pope/John/Paul
10. Richard/Rouse, Ph.D.
11. Charles/A./Linen-Schmidt
12. R./R./Rouse

| | 1st unit | 2nd unit | 3rd unit | 4th unit |
|---|---|---|---|---|
| 1. | Fitzgerald | Tom | | |
| 2. | FitzGibbon | T. | L. | |
| 3. | LaVigne | Lorne | T.(Dr.) | |
| 4. | Linen- | Schmidt | Charles | A. |
| 5. | O'Grady | G. | M. | |
| 6. | Pope | John | Paul | |
| 7. | Quinn- | Martin | Tom | A. |
| 8. | Rouse | R. | R. | |
| 9. | Rouse | Richard(Ph.D.) | | |
| 10. | Sister | Mary | Francis | |
| 11. | Wynn | Donna | D.(CPA) | |
| 12. | Wynn | John(Captain) | | |

Exercise 3

1. Mrs. Douglas/Newsom/(Ann) (2)
2. James/D./Coffman, Sr. (2, 3)
3. Bennie/F./Davis (2, 3)
   8032 Tumbleweed, Dallas (5, 4)
4. Philip/J./McMahan, Sr. (2, 3)
5. Jane Fonda
   (Mrs. Tom Hayden)
6. James/D./Coffman, Jr. (2, 3)
7. Mrs. Marie/McKinley(Mrs. Louis) (2)
8. Bennie/F./Davis (2, 3)
   3817 London Ln., Dallas (5, 4)
9. James/D./Coffman, III (2, 3)
10. Philip/J./McMahan, Jr. (2, 3)
11. Penny/Marshall (2)
    (Mrs. Rob Reiner)
12. Mrs. Arma/Jean/Davis (2, 3)
    (Mrs. John)

| | 1st unit | 2nd unit | 3rd unit | 4th unit | 5th unit |
|---|---|---|---|---|---|
| 1. | Coffman | James | D.(Junior) | | |
| 2. | Coffman | James | D.(Senior) | | |
| 3. | Coffman | James | D.(Third) | | |
| 4. | Davis | Arma | Jean (Mrs. John) | | |
| 5. | Davis | Bennie | F. | Dallas | London |
| 6. | Davis | Bennie | F. | Dallas | Tumble-weed |
| 7. | Fonda | Jane (Mrs. Tom Hayden) | | | |
| 8. | Marshall | Penny (Mrs. Rob Reiner) | | | |
| 9. | McKinley | Marie (Mrs. Louis) | | | |

Exercise #2, Slide #5: Code each of the following names by underlining the first indexing unit and placing numbers above the remaining indexing units. Then place the names in correct alphabetic and indexing order on the lines provided.

Unarranged Listing

Lola McKinney
2224 Hughes Circle
El Paso, TX 79907

Charles St. Clair
2000 Washington St.
Laredo, TX 78040

Wm. McKinney
1701 Oak Drive
Richardson, TX 75081

Merribess O'Flannery
1432 Congress Avenue
Austin, TX 78701

Indexed and Alphabetized Listing

1. _____
_____
_____

2. _____
_____
_____

3. _____
_____
_____

4. _____
_____
_____

KEY

Activity 3

| | | | |
|---|---|---|---|
| 1. | Mrs. Joan/Davis (Mrs. John/L.) | "√" | Davis, John L.(Mrs.) |
| | | "SEE" | Davis, Joan(Mrs.) |
| 2. | Patricia/Davis (Mrs. David/N.) | "√" | Davis, David N.(Mrs.) |
| | | "SEE" | Davis, Patricia |
| 3. | Mrs. John/Warner (Elizabeth/Taylor) | "√" | Warner, John(Mrs.) |
| | | "SEE" | Taylor, Elizabeth |
| 4. | Jane/Fonda (Mrs. Tom/Hayden) | "√" | Hayden, Tom(Mrs.) |
| | | "SEE" | Fonda, Jane |
| 5. | Mrs. Pat/Long (Patsy/Lou/Long) | "√" | Long, Pat(Mrs.) |
| | | "SEE" | Long, Patsy Lou |
| 6. | Carol/Burnett (Mrs. Joe/Hamilton) | "√" | Hamilton, Joe(Mrs.) |
| | | "SEE" | Burnett, Carol |
| 7. | Nancy/Reagan (Mrs. Ronald) | "√" | Reagan, Ronald(Mrs.) |
| | | "SEE" | Reagan, Nancy |

KEY

Activity 4

1. Century/Machine/Shop
2. John/H./Clynch/Title/Service
3. El Capitan/Beauty/Salon
4. Fairley/Insurance/Company
5. Las/Vegas/Travel/Agency
6. Los/Angeles/Advertising/Agency
7. La Mi Tierra/Cafe
8. C./Michael/Box,/Ltd.

| | 1st | 2nd | 3rd | 4th | 5th |
|---|---|---|---|---|---|
| 1. | Box | C. | Michael | Limited | |
| 2. | Century | Machine | Shop | | |
| 3. | Clynch | John | H. | Title | Service |
| 4. | El Capitan | Beauty | Salon | | |
| 5. | Fairley | Insurance | Company | | |
| 6. | La Mi Tierra | Cafe | | | |
| 7. | Las | Vegas | Travel | Agency | |
| 8. | Los | Angeles | Advertising | Agency | |

KEY

Activity 5

1. Gullet/Henson/Grocery/Store
2. Half/Price/Bookstore
3. Highway/Machine/Shop
4. Hoffman/LaRoche/, Inc.
5. I/B/D/Corporation
6. North East/Paint/Shop
7. Northwest/Supply/Company
8. Gordon's/Transport/System
9. O/S/O/C/, Inc.
10. J./C./Applicance/Store

| | 1st | 2nd | 3rd | 4th | 5th |
|---|---|---|---|---|---|
| 1. | Gordon(s) | Transport | System | | |
| 2. | Gullet- | Henson | Grocery | | |
| 3. | Half- | Price | Bookstore | | |
| 4. | Highway | Machine | Shop | | |
| 5. | Hoffman- | LaRoche | Incorporated | | |
| 6. | I | B | D | Corporation | |
| 7. | J. | C. | Applicance | Store | |
| 8. | North East | Paint | Shop | | |
| 9. | Northwest | Supply | Company | | |
| 10. | O | S | O | C | Inc. |

KEY

Activity 6

1. The Hardin/Bag &/Burlap/Shop
2. Top of the/Day/Hairstyles,/Inc.
3. 5th/Avenue/Dress/Shop
4. 4th/Edition/Seafood/Restaurant
5. One/Main/Place
6. University/State/Bank,/ Atlanta
7. University/State/Bank,/ Athens
8. Hick's/Auto/Clinic
9. The Cellar
10. 183/Lounge

| | 1st | 2nd | 3rd | 4th |
|---|---|---|---|---|
| 1. | Athens | University | State | Bank |
| 2. | Atlanta | University | State | Bank |
| 3. | Cellar (the) | | | |
| 4. | Fifth | Avenue | Dress | Shop |
| 5. | Fourth | Edition | Seafood | Restaurant |
| 6. | Hardin (the) | Bag (&) | Burlap | Shop |
| 7. | Hick (s) | Auto | Clinic | |
| 8. | One | Main | Place | |
| 9. | One hundred eighty three | Lounge | | |
| 10. | Top (of the) | Day | Hairstyles | Incorporated |

KEY

Activity 7

1. Department of Naval Affairs,/ Dominion of Canada
2. Parks and/Recreation/Commerce
3. Cass/County/Lumber/Company
4. U./S./Government/Department of Agriculture
5. U./S./Government Postal Service
6. U./S./Steel/Corporation
7. Inn/of the South
8. Houston/Post
9. Tyler/Junior/College
10. East/Texas/Chamber of Commerce
11. Texas/Mortgage/Bankers/Association
12. Deer/Park/High/School,/ Baytown

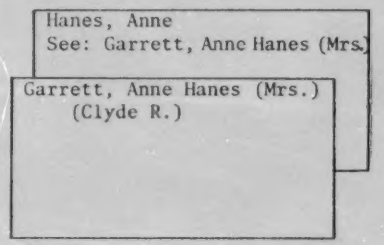
| | 1st | 2nd | 3rd | 4th | 5th |
|---|---|---|---|---|---|
| 1. | Baytown | Deer | Park | High | School |
| 2. | Canada (Dominion of) | Naval | Affairs (Dept. of) | | |
| 3. | Cass | County | Lumber | Company | |
| 4. | Commerce | Parks (and) | Recreation | | |
| 5. | East | Texas | Chamber (of) | Commerce | |
| 6. | Houston | Post | | | |
| 7. | South | Inn (of the) | | | |
| 8. | Texas | Mortgage | Bankers | Association | |
| 9. | Tyler | Junior | College | | |
| 10. | United | States | Government | Agriculture (Dept. of) | |
| 11. | United | States | Government | Postal | Service |
| 12. | U. | S. | Steel | Corporation | |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 1 | Focus/synchronize slide | |
| 2 | Title slide | |
| 3 | Miss Jones and Secretary talking to each other | Secretary: Now, Miss Jones, I believe that you are ready for the most popular of all the filing systems.<br>Miss Jones: What system is that?<br>Secretary: The alphabetic filing system. Do you remember what we said about that system?<br>Miss Jones: That is the system that is based on the alphabet...Right?<br>Secretary: Right; however, there is a little more to it than that. First, we must discuss the alphabetical indexing rules as they apply to personal names. |
| 4 | 1st unit (Last name) 2nd unit (First name or initial) 3rd unit (Second name or initial)<br>Adams, William B.<br>Constande, George J.<br>Jackson, Tony M.<br>King, Roger D.<br>Vann, Kathy A. | Secretary: The first rule deals with the order in which the indexing units are to be placed. Arrange the names of individuals in the following indexing order: (1) last name first, (2) first name second, and (3) middle name or initial last. |
| 5 | Miss Jones | Miss Jones: What happens if you have several people with the same last name? |
| 6 | Hoover, Andy<br>Hoover, Herbert<br>Hoover, James E.<br>Hoover, James F.<br>Hoover, Sally | Secretary: In this case, use the second indexing unit of each name, which is the first name. If two or more persons have the same first and last names, then the middle name or initial is used in determining alphabetical order. |
| 7 | 1. Johns, J. A.<br>2. Johns, Jill<br>3. Johnson, Sam | Secretary: Whenever you have last names that are alike, and an initial for the first name, such as example (1), "J" would come before "Jill." Whenever you have a situation such as the indexing order of examples (2) and (3), "Johns" would come before "Johnson" because "Johns" does not have any letters following the "s." This rule is known as the "Nothing before something rule." |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 8 | SURNAME PREFIXES<br><br>d', D', de, Del, Des, Di, Du, Fitz, La, Le, Mi, Me, O', St., Van, Van der, Von, Ven der, and others<br><br>DaLorento, Dino<br>McAnally, E. O.<br>MacSham, Ronald<br>O'Flanary, Harry | Secretary: A last name containing a prefix is indexed the same as any other last name or surname, even if the prefix is separated by a space, or if the first letter of the prefix is capitalized. |
| 9 | 1 2 3 4<br>Saint-Clair, Walter B. (A)<br><br>1 2 3 4<br>San Pedro, Ralph W. (B) | Secretary: Hyphenated or compound surnames are usually treated as separate indexing units. The hyphen in example (A) "Saint-Clair," is disregarded. The prefix "St." is spelled out "Saint." In case of a compound name such as example (B), "San Pedro" would be treated as separate indexing units.<br><br>Although we are going to treat the parts of hyphenated and compound surnames as separate indexing units, you should be aware that in some filing systems, hyphenated or compound surnames are treated as one indexing unit. When you go to work in an office, check with someone to learn how the firm files these names. |
| 10 | Day Ellis<br>1040 Clarksville St.<br>Paris, TX 75460<br><br>Art Johnson<br>Rt. 2<br>Longview, TX 75605<br><br>E. B. Hunt<br>1000 Commerce St.<br>Dallas, TX 75202<br><br>Elmer C. Hunt<br>1205 S.E. 20th<br>Bonham, TX 75418 | Secretary: Here is a list of personal names. Arrange them alphabetically by using the rules that we have just discussed.<br><br>Narrator: Stop the recorder until you have indexed and alphabetized the names; then turn the recorder on when you have finished this exercise on the student checksheet. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 11 | Ellis, Day<br>1040 Clarksville St.<br>Paris, TX 75460<br><br>Hunt, E. B.<br>1000 Commerce St.<br>Dallas, TX 75202<br><br>Hunt, Elmer<br>1205 S.E. 20th<br>Bonham, TX 75418<br><br>Johnson, Art<br>Rt. 2<br>Longview, TX 75605 | Narrator: Did your list look like this? If it did, congratulations; you must have a good understanding of the rules for indexing personal names. If your list does not look like this, then you may want to go back and review the parts that you missed. If your list matches this one, proceed to the next slide and some additional filing rules. |
| 12 | Sam'l P. Johnson<br><br>1 2 3<br>Johnson, Samuel P.<br>---<br>Wm. Q. Penn<br><br>1 2 3<br>Penn, William Q.<br>---<br>Theo. R. Roosevelt<br><br>1 2 3<br>Roosevelt, Theodore R. | Secretary: Index abbreviated personal names as if they were written in full. If the abbreviated name is not known, then the name would be indexed as it is.<br><br>Notice that the indexing units in each example are numbered. These numbers should indicate to you which part of the name is considered the first indexing unit, which is the second indexing unit, and so forth. |
| 13 | Mrs. Janice Barnes<br><br>1 2<br>Barnes, Janice (Mrs.)<br>---<br>Brother Joe Emmett<br><br>1 2<br>Emmet, Joe (Brother)<br>---<br>John Farley, M.D.<br><br>1 2<br>Farley, John (M.D.) | Secretary: Titles and degrees are usually not used as an indexing unit if a complete name follows the title or degree. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 14 | Brother Victor<br><br>1 2<br>Brother Victor | Secretary: However, if a title is followed by one name only, then the title becomes the first unit to be indexed. |
| 15 | Lola McKinney<br>2224 Hughes Circle<br>El Paso, TX 79907<br><br>Charles St. Clair<br>2000 Washington St.<br>Laredo, TX 78040<br><br>Wm. McKinney<br>1701 Oak Drive<br>Richardson, TX 75081<br><br>Merribess O'Flannery<br>1432 Congress Avenue<br>Austin, TX 78701 | Narrator: Now, please turn your recorder off until you have had a chance to index and list these names in correct alphabetical order on the student checksheet. Turn the recorder on when you have completed the exercise on the student checksheet. |
| 16 | McKinney, Lola<br>2224 Hughes Circle<br>El Paso, TX 79907<br><br>McKinney, William<br>1701 Oak Drive<br>Richardson, TX 75081<br><br>O'Flannery, Merribess<br>1432 Congress Avenue<br>Austin, TX 78701<br><br>Saint Claire, Charles<br>2000 Washington St.<br>Laredo, TX 78040 | Narrator: Check your list to see if it looks like this. Then go to the next slide and additional filing rules. |
| 17 | Mrs. Clyde R. Garrett<br>(Anne Hanes)<br><br>1 2 3<br>Garrett, Anne Hanes (Mrs.)<br>(Mrs. Clude R. Garrett)<br>---<br>Sommers, Suzanne<br>(Mrs. Mark Hammer) | Secretary: A married woman's name is filed first by her husband's last name, then by her own first name, and last by her middle initial or maiden name. If the husband's name is known, it is best to "cross-reference" this information.<br><br>If a woman chooses to keep her maiden name, then her married name is set off in parentheses, if it is known. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 18 | Miss Jones | Miss Jones: What is a "cross-reference"? |
| 19 |  | Secretary: Cross-referencing refers to the listing of a person's name or company in more than one place in the files. This illustration shows a cross-reference card. A cross-reference page or sheet may be placed in the files for convenience. Notice that one card has the woman's name listed by her maiden name. She has married Mr. Clyde Garrett, so the cross-reference card or sheet indicates that her folder can be located under Garrett. |
| 20 | (Show slide 17 again) | Secretary: In the case of married women, the woman may not be known from her maiden name, and her folder might be easier to locate if the husband's name is shown on the card. |
| 21 | Graphic of card file p. 7 Business Filing & Records Control | Secretary: Whenever you have to keep track of a large number of people, a card file becomes necessary. This file shows where a certain folder may be located. In case some names are cross-referenced, the card in the card file would show the exact location of the folder. As you can see in this illustration, card files are set up in the same way as are regular files, with primary guides and special guides. These card files may be set up for any type of filing system. |
| 22 | Show card file with tops of two cards in slide #17 showing above others | Secretary: The married woman we were talking about would be listed in at least two places in the card file--once under her married name and once under her maiden name. |
| 23 | Tom Williams, Jr.<br>Tom Williams, Sr.<br>Tom Williams, III<br>Tom Williams, IV | Secretary: Another rule that you should be familiar with deals with the treatment of seniority. Seniority titles include Jr., Sr., III, IV, and others. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 24 | Tom Williams, Jr.<br>Tom Williams, Sr. | Secretary: Seniority titles are used not as indexing units but as identifying elements when two or more people have the same name. When these seniority titles are spelled out, they are arranged alphabetically. |
| 25 | Tom Williams, III<br>Tom Williams, IV<br>Tom Williams, V | Secretary: Numbered titles may be arranged in numberical order from the lowest to the highest number, or . . . |
| 26 | Tom Williams, V (Fifth)<br>Tom Williams, IV (Fourth)<br>Tom Williams, III (Third) | Secretary: they may be arranged in alphabetical order. |
| 27 | Tom Williams, V (Fifth)<br>Tom Williams, IV (Fourth)<br>Tom Williams, Jr. (Junior)<br>Tom Williams, Sr. (Senior)<br>Tom Williams, III (Third) | Secretary: If you are filing names with a combination of seniority designations, however, alphabetize them as if the seniority designations were all spelled out as words. |
| 28 | Brother Victor<br>Mrs. Steve Swanson (Olive Needmore)<br>James Hogg, Sr.<br>James Hogg, Jr.<br>James Hogg, IV<br>James Hogg III | Narrator: Now, please turn your recorder off until you have completed the indexing and alphabetizing of these names. Turn the recorder on when you have completed the exercise on the student checksheet. |
| 29 | Brother Victor<br>Hogg, James (Fourth)<br>Hogg, James (Junior)<br>Hogg, James (Senior)<br>Hogg, James (Third)<br>Swanson, Olive Needmore(Mrs.) {may be cross-referenced as Swanson, Steve(Mrs.)} | Narrator: Does your list look like this? Did you remember to cross-reference Mrs. Swanson? If your list is correct, proceed to the next slide and additional filing rules. |

31

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 30 | Miss Jones | Miss Jones: How would you file a name if it is exactly the same as another person's name? |
| 31 | John C. Crabtree<br>728 Pine Street<br>Kilgore, TX 75662<br><br>John C. Crabreee<br>1442 Broadway Avenue<br>Tyler, TX 75702 | Secretary: If the names of two or more people are exactly the same, then you would use the city name to determine the filing order. |
| 32 | Sam Allen<br>1224 Washington St.<br>Athens, Georgia 30601<br><br>Sam Allen<br>128 Corsicana Avenue<br>Athens, Texas 75751 | Secretary: If they live in the same city, but in different states, then you would use the state name to determine the filing order. |
| 33 | Fred Green<br>4221 Division St.<br>Greenville, TX 75401<br><br>Fred Green<br>8342 Wesley St.<br>Greenville, TX 75401 | Secretary: If the person's name, city, and state are identical, then you would use the street name to determine the filing order. |
| 34 | Vince Smith<br>6125 Bois d'Arc St.<br>Commerce, TX 75428<br><br>Vince Smith<br>8342 Bois d'Arc St.<br>Commerce, TX 75428 | Secretary: If everything including the street name is identical, the house number becomes the final determining factor. The order for numbers ranges from the lowest to the highest. |
| 35 | John David<br>1 2<br>David, John<br>---<br>Kiku Kina<br>1 2<br>Kina, Kiku | Secretary: You may come across a situation in which you cannot determine which name is the surname. In a situation such as this, you would index first the name that is written last. In other words, treat the name like any other name and assume the part written last is the surname. Cross-referencing these names might also make them easier to locate. |

33

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 36 | Claude Roberts<br>1432 Alamo<br>San Antonio, TX 78210<br><br>Claude Roberts<br>428 Inwood Road<br>Dallas, TX 75427<br><br>Claude Roberts<br>329 Hemisphere Plaza<br>San Antonio, TX 78205<br><br>Claude Roberts<br>1462 Main St.<br>Dallas, TN 37319<br><br>Claude Roberts<br>7290 Inwood Road<br>Dallas, TX 75209 | Narrator: Stop the recorder until you have indexed and alphabetized these names on the student checksheet; then turn the recorder back on to check your work. |
| 37 | Roberts, Claude<br>1462 Main Street<br>Dallas, TN 37319<br><br>Roberts, Claude<br>428 Inwood Road<br>Dallas, TX 75427<br><br>Roberts, Claude<br>7290 Inwood Road<br>Dallas, TX 75209<br><br>Roberts, Claude<br>1432 Alamo<br>San Antonio, TX 78210<br><br>Roberts, Claude<br>329 Hemisphere Plaza<br>San Antonio, TX 78205 | Narrator: Correctly, your list will look like this. If you missed any of the names that you indexed, you should go back and review those parts of which you are uncertain. |
| 38 | Miss Jones and secretary talking | Miss Jones: I believe that I understand the rules for indexing personal names now. What's next?<br><br>Secretary: Now we should discuss the indexing rules that apply to businesses. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 39 | Secretary | Secretary: Alphabetic indexing is also important when dealing with business names. For example, if a business name contains the complete name of an individual, |
| 40 | Example:<br>Pat R. Smith Repair Shop<br>Indexed as:<br>1 2 3 4 5<br>Smith Pat R. Repair Shop | Secretary: the last name would be indexed first, the first name second, followed by any middle name or initial. This rule reinforces the rule on the treatment of personal names; personal names are treated in this way regardless of where they are found. Any other units in a business name are indexed in the order in which they are shown. |
| 41 | Co. = Company<br>Inc. = Incorporated | Secretary: One thing you must remember when indexing is to spell out abbreviated words in business names. For example, Co. becomes Company; Inc. becomes Incorporated, and so forth. |
| 42 | 1 2<br>El Buen Restaurant | Secretary: As I mentioned before, names of businesses are indexed in the order in which they are written. However, business names containing a Non-English prefix are considered one indexing unit. |
| 43 | Example:<br>Kwik-Stop Car Wash<br>Indexed as:<br>3 4<br>Kwik-Stop Car Wash<br>---<br>Example:<br>Chas. Kristy-Louis Funeral Home<br>Indexed as:<br>1 2 3 4 5<br>Kristy-Louis Charles Funeral Home | Secretary: Hyphenated words in a business name are considered separate indexing units and should be indexed in the order in which they are written.<br><br>However, in some filing systems, hyphenated business names are treated as one indexing unit. If a question arises, ask someone in your firm or check the files. |



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42

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 44 | Example:<br><br>St. Thomas, Inc.<br><br>Indexed as:<br><br>1 2 3<br>Saint Thomas Incorporated<br><br>Example:<br><br>NAT Corp.<br><br>Indexed as:<br><br>1 2 3 4<br>N A T Corporation | Secretary: Spell out abbreviated words and consider them as separate indexing units. Single letters are considered separate indexing units, too. |
| 45 | Miss Jones looking frustrated | Miss Jones: Wait a minute, how do you expect me to remember all of these rules? Can you give me some examples for review? |
| 46 | W. R. Grace Lumber Co.<br><br>Cen-Tex, Inc.<br><br>La Tapatia Jewelers<br><br>AAA Locksmith Corp. | Secretary: Okay, here are some business names. Arrange them in correct alphabetic and indexing order.<br><br>Narrator: Please turn the recorder off until you have completed the exercise on the student checksheet. |
| 47 | 1 2 3 4 5<br>A A A Locksmith Corporation<br><br>1 2 3<br>Cen-Tex Incorporated<br><br>1 2 3 4 5<br>Grace W. R. Lumber Company<br><br>1 2<br>La Tapatia Jewelers | Secretary: Did your list look like this? If not you may want to go back and review that last section on business names. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 48 | Example:<br>Down Town Restaurant<br>Indexed as:<br>1 2<br>Downtown Restaurant | Secretary: When filing business names, words that can be written as either one or two words are considered as one indexing unit. Examples of such words are southwest, interstate, midwest, and airport. |
| 49 | Example:<br>New York Rental Firm<br>Indexed as:<br>1 2 3 4<br>New York Rental Firm | Secretary: If the business name is a compound geographical name, each name is considered a separate indexing unit. In this example, New York has two indexing units. |
| 50 | Example:<br>Myer's Grocery Store<br>Indexed as:<br>1 2 3<br>Myer ('s) Grocery Store | Secretary: If the business name shows possession, use this guide: "Consider everything up to the apostrophe." Everything up to the apostrophe in a business name is a part of the indexing unit. Anything after the apostrophe is disregarded. The 's is placed in parentheses at the end of the word as is shown in the example. |
| 51 | Northwest Airlines<br>Japan Air Lines<br>San Francisco Steakhouse<br>A. J. Richard's Antiques | Secretary: Now--would you like to try another short exercise? Here are some business names. Arrange them in correct alphabetic and indexing order.<br>Narrator: Please stop the tape recorder until you have completed the activity on the student checksheet. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 52 | 1 2<br>Japan Airlines<br><br>1 2<br>Northwest Airlines<br><br>1 2 3 4<br>Richard ('s) A. J. Antiques<br><br>1 2 3<br>San Francisco Steakhouse | Miss Jones: I think I indexed the business names correctly. Are there any more rules I need to know about business names? |
| 53 | Example:<br><br>The Shoemaker, Inc.<br><br>Indexed as:<br><br>1 2<br>Shoemaker Incorporated (The)<br><br>Example:<br><br>Arnold the Shoemaker<br><br>Indexed as:<br><br>1 2<br>Arnold (the) Shoemaker | Secretary: Yes. Usually minor words in a business name, such as the, and, of, in, and by are not considered indexing units. If "the" is the first word in a company name, place it in parentheses at the end of the name. Put other words not regarded as indexing units in parentheses in the order in which they appear in the name. |
| 54 | Example:<br><br>At Home Shoemaker<br><br>Indexed as:<br><br>1 2 3<br>At Home Shoemaker | Secretary: If a preposition is the first word in the name, it is considered an indexing unit. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 55 | Example:<br><br>First State Bank of Atlanta<br><br>Indexed as:<br><br>1 2 3 4<br>Atlanta First State Bank (of) | Secretary: When indexing bank names, the first unit is the name of the city and the next units contain the rest of the bank name. For example, First State Bank, Atlanta, should be indexed as shown on this slide. |
| 56 | Example:<br><br>1 Main Place<br><br>Indexed as:<br><br>1 2 3<br>One Main Place<br><br>Example:<br><br>747 Fashion Club<br><br>Indexed as:<br><br>1 2 3<br>Seven hundred forty seven Fashion Club<br><br>Example:<br><br>The 5,000 Table Restaurant<br><br>Indexed as:<br><br>1 2 3<br>five thousand Table Restaurant (The) | Secretary: Numbers in a caption (or name) are indexed by writing the number out and considering it as one indexing unit. When numbers are over 1,000, such as 1,425, they should be written as fourteen hundred twenty five, not one thousand four hundred twenty five. However, even numbers such as 2,000, 3,000, and so forth are always expressed as thousands. |

45

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 57 | Example:<br><br>Bob's Diner, Dallas<br>Bob's Diner, 101 Maple, Denver<br>Bob's Diner, 2521 Maple, Denver<br><br>Indexed as:<br><br>1 2 3 4 5<br>Bob('s) Diner Dallas<br>Bob('s) Diner Denver Maple 101<br>Bob('s) Diner Denver Maple 2521 | Secretary: If the business names are alike, consider the addresses in indexing. The parts of the address should be considered in the following order: city, state (if the cities are the same), street (if the cities and states are the same), and street number (arrange from lowest to highest if all of the above are the same). This procedure is the same one you followed when filing personal names that were the same. |
| 58 | The Pit Stop<br><br>Houston State Bank<br><br>4900 Club<br><br>Harry Carry's Lounge, Detroit<br><br>Harry Carry's Lounge, Chicago | Secretary: To review the rules we have just discussed, alphabetize and index these business names.<br><br>Narrator: Please stop the tape recorder until you have completed the exercise. |
| 59 | 1 2 3 4<br>Forty nine hundred Club<br><br>Carry('s) Harry Lounge Chicago<br><br>Carry('s) Harry Lounge Detroit<br><br>Houston State Bank<br><br>Pit Stop (the) | Miss Jones: I have all of them indexed correctly. So far, we haven't discussed government names. Are there any special rules regarding government names? |
| 60 | 1st unit---United<br>2nd unit---States<br>3rd unit---Government<br>Next unit--Name of department, bureau, or division | Secretary: Yes! Names of the various branches of the U.S. Government are indexed as follows. The first indexed unit is United, followed by States, with Government becoming the third indexing unit. The name of the department, division, or bureau becomes the next unit. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 61 | Examples:<br><br>U. S. Dept. of Labor<br><br>Bureau of Better Homes<br><br>Indexed as:<br><br>1 2 3<br>Bureau(of) Better Homes<br><br>1 2 3 4<br>United States Government Labor(Dept. of) | Secretary: One point to remember is that the titles such as Department of, Bureau of are not indexing units and are placed in parentheses after the name. This is not the case if the title is in a nongovernmental name. |
| 62 | Example:<br><br>Council of Defense, Republic of France<br><br>Indexed as:<br><br>1 2<br>France Defense<br>(Republic of) (Council of) | Secretary: Foreign government names are indexed using the name of the country as the first unit followed by the name of the department, with the next unit being the name of the division, board, or commission, if given.<br><br>Notice that words that show what kind of government this country represents, in this case Republic, and what type of division is referred to, in this case Council, are placed in parentheses rather than being used as indexing units. |
| 63 | Example:<br><br>Gary City Board of Education<br><br>Indexed as:<br><br>1 2 3<br>Gary City Education<br>(Board of) | Secretary: For city, county, and state government names, index the names of the political division for the city, county, and state. The first unit would contain the name of the city, county, or state, while the second unit would indicate if this division was a city, a county, a state, and so forth. The next unit would specify the name of the department, bureau, or board. The example, Gary City Board of Education is indexed on the slide. |
| 64 | U. S. Dept. of Agriculture<br><br>South America War Ministry<br><br>Washington County Health Dept.<br><br>Tarrant County Convention Center | Secretary: Would you like to try another short review exercise on government names? Alphabetize and index these governmental names.<br><br>Narrator: Please stop the tape recorder until you have completed the exercise. |

| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 65 | 1 2 3 4<br>South America War(Ministry)<br>Tarrant County Convention Center<br>United States Government Agriculture (Dept. of)<br>Washington County Health (Dept.) | Miss Jones: I'm still keeping my perfect record. I didn't realize there were so many different rules. Are we nearly finished with the rules for alphabetic indexing? |
| 66 | Examples:<br>Petterson Grade School, Zinc, Texas<br>School of Law, Harvard<br>Indexed as:<br>1 2 3 4<br>Harvard University Law School(of)<br>Zinc Petterson Grade School | Secretary: We have only a few more rules to examine. Elementary and secondary school names are indexed by the city first, and then by the name of the school. Colleges and universities are indexed by the most indentifying unit first, and then by the remaining parts of the name. |
| 67 | Examples:<br>Motel 6<br>Temple Baptist Church<br>Indexed as:<br>1 2 3<br>Baptist Church Temple<br>Six Motel | Secretary: For churches, hotels, motels, and organizations, the most indentifying unit is considered the first indexing unit. With churches, the denomination is listed first, if given. On the other hand, consider the name Motel 6. The word which distinguishes it from any other motel or hotel is the word six. Therefore, six becomes the first indexing unit. |

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| SLIDE NO. | SLIDE DESCRIPTION | NARRATIVE |
|---|---|---|
| 68 | Examples:<br>Express-News, San Antonio<br>Newsweek<br>Good Housekeeping<br>Indexed as:<br>1 2 3 4<br>Good Housekeeping<br>Newsweek<br>San Antonio Express-News | Secretary: Finally, we need to consider newspapers and magazines. We index newspapers first by the city, and then by the name of the newspaper. Magazines are indexed as the names are written. |
| 69 | Miss Jones holding cross-reference card toward secretary | Miss Jones: We looked at cross-referencing earlier when we were concerned with personal names. Are there any more cross-referencing rules that I should know:<br>Secretary: Yes, there are several cross-referencing rules that apply to business names as well as to unusual personal names. For right now, let's make sure you understand and can apply the rules we have just discussed. |
| 70 | Miss Jones and secretary overlooking filing drawers | Secretary: Since alphabetic filing is the most popular filing system, it is important that you be able to utilize the various rules that apply to personal, business, and other common names. |
| 71 | Credits slide | |

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# STUDENT ACTIVITY PACKET

# ALPHABETICAL INDEXING FOR NAMES OF INDIVIDUALS AND BUSINESSES

STUDENT ACTIVITY PACKET

## Objective

To apply rules for indexing personal, business, and other names

## Introduction

Business today is vitally concerned with cost efficiency and conservation of resources; today's office employee must share this concern. Because alphabetic filing systems are the easiest to learn and to maintain, they represent the most economical method of record storage. Therefore, the person who wants to become a valued office employee must understand and be able to use alphabetical filing rules.

## Purpose

The activities in this packet will give you practical experience in using the alphabetic filing rules when dealing with names of individuals, businesses, and other types of organizations.

## Materials

Pen or pencil
*Student checksheet for use with the slide/tape presentation
*Activity Sheet #1
*Activity Sheet #2
*Activity Sheet #3
*Activity Sheet #4
*Activity Sheet #5
*Activity Sheet #6
*Activity Sheet #7

*These materials are provided as a part of this activity packet.

## Directions

This packet contains activity sheets for seven activities. Each of these activity sheets gives specific instructions for the tasks to be completed.

As you complete each of the activities in this packet, submit it to your instructor for evaluation.

STUDENT CHECKSHEET

(To Be Used with Slide/Tape Presentation)

This sheet is provided as a convenient means of taking notes during the slide/tape presentation. The exercises presented here correspond to those exercises you are instructed to complete during the slide/tape presentation.

Exercise #1, Slide #10: Arrange these names alphabetically by using the rules discussed.

| Unarranged Listing | Alphabetical Listing |
|---|---|
| Day Ellis<br>1040 Clarksville St.<br>Paris, TX 75460 | 1. _____ |
| Art Johnson<br>Rt. 2<br>Longview, TX 75605 | 2. _____ |
| E. B. Hunt<br>1000 Commerce St.<br>Dallas, TX 75202 | |
| Elmer C. Hunt<br>1205 S. E. 20th<br>Bonham, TX 75418 | 3. _____ |
| | 4. _____ |

| | 1st unit | 2nd unit | 3rd unit | 4th unit | 5th unit |
|---|---|---|---|---|---|
| 10. | McMahan | Philip | J.(Jr.) | | |
| 11. | McMahan | Philip | J.(Sr.) | | |
| 12. | Newsom | Ann (Mrs. Douglas) | | | |

Exercise #3, Slide #28: Code each of the following names by underlining the first indexing unit and placing numbers above the remaining indexing units. Then place the names in correct alphabetic and indexing order on the lines provided.

| Unarranged Listing | Indexed and Alphabetized Listing |
|---|---|
| Brother Victor | 1. _____ |
| Mrs. Steve Swanson (Olive Needmore) | 2. _____ |
| James Hogg, Sr. | 3. _____ |
| James Hogg, Jr. | |
| James Hogg, IV | 4. _____ |
| James Hogg, III | 5. _____ |
| | 6. _____ |

Exercise #4, Slide #36: Code each of the following names by underlining the first indexing unit and placing numbers above the remaining indexing units. Then place the names in correct alphabetic and indexing order on the lines provided.

Unarranged Listing

Claude Roberts
1432 Alamo
San Antonio, TX 78210

Claude Roberts
428 Inwood Road
Dallas, TX 75427

Claude Roberts
329 Hemisphere Plaza
San Antonio, TX 78205

Claude Roberts
1462 Main St.
Dallas, TX 37319

Claude Roberts
7290 Inwood Road
Dallas, TX 75209

Indexed and Alphabetized Listing

1. _____
_____
_____

2. _____
_____
_____

3. _____
_____
_____

4. _____
_____
_____

5. _____
_____
_____

Exercise #5, Slide #46: Code each of the following names by underlining the first indexing unit and placing numbers above the remaining indexing units. Then place the names in correct alphabetic and indexing order on the lines provided.

Unarranged Listing

W. R. Grace Lumber Co.

Cen-Tex, Inc.

La Tapatia Jewelers

AAA Locksmith Corp.

Indexed and Alphabetized Listing

| | Unit 1 | Unit 2 | Unit 3 | Unit 4 | Unit 5 |
|---|---|---|---|---|---|
| 1. | _____ | _____ | _____ | _____ | _____ |
| 2. | _____ | _____ | _____ | _____ | _____ |
| 3. | _____ | _____ | _____ | _____ | _____ |
| 4. | _____ | _____ | _____ | _____ | _____ |

Exercise #6, Slide #51: Code each of the following names by underlining the first indexing unit and placing numbers above the remaining indexing units. Then place the names in correct alphabetic and indexing order on the lines provided.

Unarranged Listing

Northwest Airlines

Japan Air Lines

San Francisco Steakhouse

A. J. Richard's Antiques

Indexed and Alphabetized Listing

| | Unit 1 | Unit 2 | Unit 3 | Unit 4 |
|---|---|---|---|---|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

Exercise #7, Slide #58: Code each of the following names by underlining the first indexing unit and placing numbers above the remaining indexing units. Then place the names in correct alphabetic and indexing order on the lines provided.

Unarranged Listing

The Pit Stop

Houston State Bank

4900 Club

Harry Carry's Lounge, Detroit

Harry Carry's Lounge, Chicago

Indexed and Alphabetized Listing

| | Unit 1 | Unit 2 | Unit 3 | Unit 4 |
|---|---|---|---|---|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |
| 5. | | | | |

Exercise #8, Slide #64: Code each of the following names by underlining the first indexing unit and placing numbers above the remaining indexing units. Then place the names in correct alphabetic and indexing order on the lines provided.

Unarranged Listing

U. S. Dept. of Agriculture

South America War Ministry

Washington County Health Dept.

Tarrant County Convention Center

Indexed and Alphabetized Listing

| | Unit 1 | Unit 2 | Unit 3 | Unit 4 |
|---|---|---|---|---|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

ACTIVITY SHEET

Activity 1

Directions: Arrange the list below in correct indexing order.

| | 1st | 2nd | 3rd |
|---|---|---|---|
| 1. Carol Ann Beasley | | | |
| 2. James D. Coyne | | | |
| 3. Barbara Jane Dexter | | | |
| 4. Thomas H. Ensley | | | |
| 5. Linda Jo Franks | | | |

Directions: Arrange the names listed below in correct alphabetic and indexing order.
(NOTE: Remember to alphabetize the list of names first and then place the indexing units in the spaces provided.)

| | 1st | 2nd | 3rd |
|---|---|---|---|
| 1. James T. Corley | | | |
| 2. Allen T. Smith | | | |
| 3. Betty Franks | | | |
| 4. Jean Carlton | | | |
| 5. Mark Fietz | | | |
| 6. Allen A. Smith | | | |

Directions: Arrange the names listed below in correct indexing order, remembering the "nothing before something" rule.

| | | 1st | 2nd | 3rd |
|---|---|---|---|---|
| 1. | H. Curry | | | |
| 2. | Hazel Curry | | | |
| 3. | J. Curry | | | |
| 4. | J. B. Curry | | | |
| 5. | Dabbs | | | |
| 6. | L. Dabbs | | | |

Directions: Arrange the names listed below in correct indexing order, paying attention to last name prefixes.

| | | 1st | 2nd | 3rd |
|---|---|---|---|---|
| 1. | Joseph D'Ambrosio | | | |
| 2. | Nicholos DaPrile | | | |
| 3. | John Deer | | | |
| 4. | Joan DeLuca | | | |
| 5. | Randy J. MacFarland | | | |
| 6. | George St. James | | | |

Directions: Place the names listed below in correct alphabetic and indexing order, remembering the rule concerning hyphenated last names.

| | | 1st | 2nd | 3rd |
|---|---|---|---|---|
| 1. | Charles Lein-Schmidt | | | |
| 2. | Pat Corbie-Bender | | | |
| 3. | Asad Al-Alawi | | | |
| 4. | John Barry-Smith | | | |
| 5. | Min Kwang-Shik | | | |

Directions: Arrange the names listed below in correct alphabetic and indexing order, paying special attention to their titles or degrees.

| | | 1st | 2nd | 3rd |
|---|---|---|---|---|
| 1. | Mrs. Linda Cromer | | | |
| 2. | Sister Francis | | | |
| 3. | Father Jason DeLoney | | | |
| 4. | Mary Hays, D.D.S. | | | |
| 5. | Queen Mary | | | |
| 6. | Governor Jan Carter | | | |
| 7. | Charles Green, M.D. | | | |
| 8. | Father John | | | |

Directions: Place the names listed below in correct alphabetic and indexing order, remembering rules relating to titles and seniority.

| | | 1st | 2nd | 3rd |
|---|---|---|---|---|
| 1. | H. Curry | | | |
| 2. | Randy J. McFarland | | | |
| 3. | W. A. Stewart, II | | | |
| 4. | W. A. Stewart, Sr. | | | |
| 5. | John Deer | | | |
| 6. | Father Tom O'Malley | | | |

Directions: Arrange the names listed below in correct alphabetic and indexing order.

| | | 1st | 2nd | 3rd |
|---|---|---|---|---|
| 1. | C. B. Grant<br>Boston | | | |
| 2. | C. B. Grant<br>Chicago | | | |
| 3. | Al Ablowich | | | |
| 4. | Carl Ball | | | |
| 5. | Claude Lovell | | | |

Directions: Place the names listed below in correct alphabetic and indexing order; remember information on married women's names and titles.

| | 1st | 2nd | 3rd |
|---|---|---|---|
| 1. Alice Little (Mrs. John) | | | |
| 2. Miss Frances Potter | | | |
| 3. Mary Tyler Moore (Mrs. Grant Tinker) | | | |
| 4. Mrs. M. W. Smith (Mary) | | | |
| 5. Carol Burnett (Mrs. Joe Hamilton) | | | |
| 6. Mrs. Carol Long (Mrs. William) | | | |
| 7. Jane DeWolfe (Mrs. Amos) | | | |
| 8. Rev. Joan Sanders | | | |

Directions: Arrange the names listed below in correct alphabetic and indexing order.

| | 1st | 2nd | 3rd |
|---|---|---|---|
| 1. C. W. McBrayer | | | |
| 2. Dr. Larry Mathis | | | |
| 3. Mrs. Pati Mayer (Mrs. John) | | | |
| 4. Carl Wright, D.O. | | | |
| 5. Prince Phillip | | | |
| 6. Karl Wright | | | |
| 7. L. Mathis | | | |
| 8. Joanne Woodward (Mrs. Paul Newman) | | | |
| 9. Bertha O'Neal (Mrs. Tom) | | | |
| 10. Robt. Holmes | | | |

ACTIVITY SHEET

Activity 2

Exercise 1: Complete the following exercise using these steps:

1. Divide each unit in a name with a diagonal line (/)
2. Underline the first indexing unit
3. Indicate the other units by numbers
4. Write the names in correct alphabetic filing order in the blanks provided

Example: James/Ray/Aarons (2 3)

1. Devin G. Abbe
2. William J. Zigrang
3. Cleve R. Graham
4. Charles N. Clardy
5. Bob Barker
6. John C. Rast
7. Allen Abbey
8. W. J. Zigrang
9. Bob J. Barker
10. David M. Clardy
11. Terry Paul Rast
12. Christy Graham

| | 1st Unit | 2nd Unit | 3rd Unit |
|---|---|---|---|
| 0. | Aarons | James | Ray |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| 8. | | | |
| 9. | | | |
| 10. | | | |
| 11. | | | |
| 12. | | | |

Exercise 2 : Complete this exercise following these steps:

1. Divide each unit in a name with a diagonal line (/)
2. Underline the first indexing unit
3. Indicate the other units by numbers
4. Write the names in correct alphabetic filing order in the blanks provided

Example: 2 Jake/DeVoe

1. Tom FitzGerald
2. Captain John Wynn
3. Dr. Lorne T. LaVigne
4. Donna D. Wynn, CPA
5. Sister Mary Francis
6. Tom A. Quinn-Martin
7. T. L. FitzGibbon
8. G. M. O'Grady
9. Pope John Paul
10. Richard Rouse, Ph.D.
11. Charles A. Linen-Schmidt
12. R. R. Rouse

| | 1st Unit | 2nd Unit | 3rd Unit |
|---|---|---|---|
| 0. | DeVoe | Jake | |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| 8. | | | |
| 9. | | | |
| 10. | | | |
| 11. | | | |
| 12. | | | |

Exercise 3: Complete this exercise using the following steps:

1. Divide each unit in a name with a diagonal line (/)
2. Underline the first indexing unit
3. Indicate the other units by numbers
4. Write the names in correct alphabetic filing order in the blanks provided

2 3
Example: Prudy/C./Cochran

1. Mrs. Douglas Newsom (Ann)
2. James D. Coffman, Sr.
3. Bennie F. Davis
   8032 Tumbleweed, Dallas
4. Philip J. McMahan, Sr.
5. Jane Fonda
   (Mrs. Tom Hayden)
6. James D. Coffman, Jr.
7. Mrs. Marie McKinley (Mrs. Louis)
8. Bennie F. Davis
   3817 London Ln., Dallas
9. James D. Coffman, III
10. Philip J. McMahan, Jr.
11. Penny Marshall
    (Mrs. Rob Reiner)
12. Mrs. Arma Jean Davis
    (Mrs. John)

| | 1st Unit | 2nd Unit | 3rd Unit | 4th Unit | 5th Unit |
|---|---|---|---|---|---|
| 0. | Cochran | Prudy | C. | | |
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |
| 4. | | | | | |
| 5. | | | | | |
| 6. | | | | | |
| 7. | | | | | |
| 8. | | | | | |
| 9. | | | | | |
| 10. | | | | | |
| 11. | | | | | |
| 12. | | | | | |

ACTIVITY SHEET

Activity 3

Directions: Complete the following exercise by using these steps:

A. Cross-Reference

1. Select the name to be cross-referenced and place a "✓" beside it
2. Divide each unit in this name with a diagonal line (/)
3. Underline the first unit of the cross-referenced name
4. Indicate the other units of the name with numbers

B. Primary Name

1. Select the primary name (the name under which the actual file can be found)
2. Divide each unit in this name with a diagonal line (/)
3. Underline the first unit of the primary name
4. Indicate other units of the name with numbers

C. Write the cross-referenced name in the blank space with a "✓"

D. Write the primary name in the blank space with "SEE"

Example:

2
Mrs. Peggy/Smith
(Mrs. David/J.) ✓
2 3

"✓" Smith, David J. (Mrs.)

"SEE" Smith, Peggy (Mrs.)

1. Mrs. Joan Davis
(Mrs. John L.)

"✓" _____

"SEE" _____

2. Patricia Davis
(Mrs, David N.)

"✓" _____

"SEE" _____

3. Mrs. John Warner
(Elizabeth Taylor)

"✓" _____

"SEE" _____

4. Jane Fonda
(Mrs. Tom Hayden)

"✓" _____

"SEE" _____

5. Mrs. Pat Long (Patsy Lou)
   "✓" _____
   "SEE" _____

6. Carol Burnett (Mrs. Joe Hamilton)
   "✓" _____
   "SEE" _____

7. Nancy Reagan (Mrs. Ronald)
   "✓" _____
   "SEE" _____

ACTIVITY SHEET

Activity 4

Directions: Complete this exercise by following these steps:

1. Divide each unit in a name with a diagonal line (/)
2. Underline the first indexing unit
3. Indicate the other units by numbers
4. Write the names in correct alphabetic filing order in the blanks below

Example:

2 3 1 4
Wm./W./Causey/Inc.

| 1st | 2nd | 3rd | 4th |
|---|---|---|---|
| Causey | William | W. | Incorporated |

1. Century Machine Shop
2. Joe H. Clynch Title Service
3. El Capitan Beauty Salon
4. Fairley Insurance Company
5. Las Vegas Travel Agency
6. Los Angeles Advertising Agency
7. La Mi Tierra Cafe
8. C. Michael Box, Ltd.

| | 1st | 2nd | 3rd | 4th | 5th |
|---|---|---|---|---|---|
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |
| 4. | | | | | |
| 5. | | | | | |
| 6. | | | | | |
| 7. | | | | | |
| 8. | | | | | |

# ACTIVITY SHEET

## Activity 5

Directions: Complete this exercise by following these steps:

1. Divide each unit in a name with a diagonal line (/)
2. Underline the first indexing unit
3. Indicate the other units by numbers
4. Write the names in correct alphabetic filing order in the blanks below

Example:

2 3
Del-/May/Company

| 1st | 2nd | 3rd |
|---|---|---|
| Del- | May | Company |

1. Gullet-Henson Grocery Store
2. Half-Price Book Store
3. Highway Machine Shop
4. Hoffman-LaRoche, Inc.
5. IBD Corporation
6. North East Paint Shop
7. Northwest Supply Company
8. Gordon's Transport System
9. OSOC, Inc.
10. J. C. Appliance Store

| | 1st | 2nd | 3rd | 4th | 5th |
|---|---|---|---|---|---|
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |
| 4. | | | | | |
| 5. | | | | | |
| 6. | | | | | |
| 7. | | | | | |
| 8. | | | | | |
| 9. | | | | | |
| 10. | | | | | |

# ACTIVITY SHEET

## Activity 6

Directions: Complete this exercise by following these steps:

1. Divide each unit in a name with a diagonal line (/)
2. Underline the first indexing unit
3. Indicate the other units by numbers
4. Write the names in correct alphabetic filing order in the blanks below

Example: At/Home/Decorators (2 3)

| 1st | 2nd | 3rd |
|---|---|---|
| At | Home | Decorators |

1. The Hardin Bag & Burlap Shop
2. Top of the Day Hairstyles, Inc.
3. 5th Avenue Dress Shop
4. 4th Edition Seafood Restaurant
5. One Main Place
6. University State Bank, Atlanta
7. University State Bank, Athens
8. Hick's Auto Clinic
9. The Cellar
10. 183 Lounge

| | 1st | 2nd | 3rd | 4th |
|---|---|---|---|---|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |
| 5. | | | | |
| 6. | | | | |
| 7. | | | | |
| 8. | | | | |
| 9. | | | | |
| 10. | | | | |

# ACTIVITY SHEET

## Activity 7

Directions: Complete this exercise by following these steps:

1. Divide each unit in a name with a diagonal line (/)
2. Underline the first indexing unit
3. Indicate the other units by numbers
4. Write the names in correct alphabetic filing order

Example: 2 3
Abbott/City/Police Department

| 1st | 2nd | 3rd |
|---|---|---|
| Abbott | City | Police (Dept.) |

1. Department of Naval Affairs, Dominion of Canada
2. Parks & Recreation, Commerce
3. Cass County Lumber Company
4. U.S. Department of Agriculture
5. U.S. Postal Service
6. U.S. Steel Corporation
7. Inn of the South
8. Houston Post
9. Tyler Junior College
10. East Texas Chamber of Commerce
11. Texas Mortgage Bankers Association
12. Deer Park High School, Baytown

| | 1st | 2nd | 3rd | 4th | 5th |
|---|---|---|---|---|---|
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |
| 4. | | | | | |
| 5. | | | | | |
| 6. | | | | | |
| 7. | | | | | |
| 8. | | | | | |

| | 1st | 2nd | 3rd | 4th | 5th |
|---|---|---|---|---|---|
| 9. | | | | | |
| 10. | | | | | |
| 11. | | | | | |
| 12. | | | | | |